

- » Getting to know the various Microsoft 365 licenses
- » Exploring the productivity apps for the workplace version
- » Creating a project collaboration hub in Teams

## Chapter **1**

# What's in It for You: Overview of Features

There is a “conspiracy” in the IT industry to make some of us feel like clueless Boomers when the phrase “digital transformation” gets thrown about as if we’re all supposed to know what that means. And it doesn’t help when high-priced consultants start using terms like “solid business architecture,” “optimizing application portfolio,” or “data governance” as if they’re speaking plain English.

I have a *For Dummies* definition of digital transformation, and it goes like this: “Out with the old that doesn’t work and in with the new that makes things work better.”

Think of it this way. Have you, or someone you know, done banking online? Or sent money to a friend via Venmo? Bought a skincare product based on a post from an Instagram influencer? Completed a task using the Internet? Or attended a meeting with your colleagues from your phone while driving? If you have, then you’ve been touched by digital transformation. Knowingly or unknowingly, you have contributed to an organization’s effort to use digital technologies in replacing the old way of doing things with new ways to reach you or make your experience better.

If your company invested in Microsoft 365 (formerly known as Office 365) technologies when it first came out in 2010, then your company saw the value of digital transformation early on. For some organizations, however, it took a pandemic to realize the need for digital transformation. Imagine what it was like for the IT team that suddenly had to deal with enabling employees to work from home. From network connectivity to device management to data security, we don't talk enough about the heroic efforts IT professionals had to perform to transform organizations in the middle of a global health crisis. They literally had to replace the old with the new and keep adjusting to new things overnight. As Glenn Requierme, CIO for Rehabilitation Hospital of the Pacific and IT Professor, puts it: "My team and I had to pull all-nighters to ensure our employees could work from home while minimizing the impact on the quality of our services to our patients."

For some smaller IT companies servicing the small- and medium-sized businesses digital transformation initiatives, the effort was beyond heroic. They had to help businesses with no IT staff figure out licensing requirements, install, configure, and train users on new collaboration features in Teams, remotely enroll devices for management for security, and a host of critical tasks all the while knowing that the businesses they are serving may not survive the pandemic and therefore may not be able to pay their bills.

Remember I said earlier there is a conspiracy in the IT industry to make some of us feel like clueless Boomers? I take that back. I think IT professionals are our unsung heroes. They save us from becoming obsolete by pushing us to continue to evolve and stay in tune with the times.

## Tasting the Flavors of Microsoft 365

Buying Microsoft 365 is like going to an ice cream shop. First you select the flavor and then you select the toppings. While there may be a lot of flavors and toppings to choose from when you go to an ice cream shop, for example, in the end, you are guaranteed a sugar rush.

Unlike the ice cream shop experience, however, choosing the wrong flavor and topping when licensing Microsoft 365 does not always guarantee a sweet experience. To set the stage, Microsoft 365 comes in two flavors: one for home or personal use and one for business or work use. Within those two flavors are secondary flavors from which to choose. For the work flavor, there are additional stand-alone features called add-ons that you can include in the license.

In this chapter, you explore the options for licensing Microsoft 365 and the features that come with those licenses so what you expect to get matches what is included in the licenses.

## Understanding the versions for home

Whether you're a student trying to write an essay like a pro or a grandmother wanting to connect with family members via a video call, the Home version of Microsoft 365 is packed with features to help you get things done. The familiar Office apps such as Word, Excel, PowerPoint, OneNote, Outlook, OneDrive, and Skype (consumer version) are included in the subscription. The apps are compatible with Windows, macOS, iOS, and Android platforms, so you can use them on multiple devices like a PC, a laptop, a tablet, or a smartphone.



TIP

If you need the license for just one person, you can subscribe to the Microsoft Personal license at \$6.99 per month or pay \$69.99 for an annual subscription. If you have two to six people needing to use the service, you are better off subscribing to the Microsoft 365 Family license at \$9.99 per month or \$99.99 per year.

Both types of licenses allow each user to use the subscription on up to five devices simultaneously. This means you can install the Office apps on five PCs if you'd like. The license also comes with technical support via chat or phone.



WARNING

There is no shortage of books explaining the features of the Office apps in detail as well as multitudes of free how-to videos. The core features of the Office apps covered in this book apply to the Home version. Please take note, however, that the focus of this book is the Work version, so Skype as a communication tool won't be covered because the Work version uses Microsoft Teams as the communication and collaboration tool.

## Exploring the options for the workplace

Not all business organizations are created equal, nor do they operate in the same way. But just because one business is a multi-national conglomerate and the other is a Mom and Pop store doesn't mean productivity and security are a must for one

and not the other. Microsoft understands this and that's why the workplace version of Microsoft 365 comes in various subscription plans.

» **For Business:** Intended for organizations with 300 or fewer users, this plan offers four flavors:

- Microsoft 365 Business Basic at \$5 per month
- Microsoft 365 Apps at \$8.25 per month
- Microsoft 365 Business Standard at \$12.50 per month
- Microsoft 365 Business Premium at \$20 per month

» **For Enterprise:** For organizations with more than 300 users, this plan offers flavors that meet the needs of the employees using the full suite of collaboration tools down to the frontline worker like those who work in retail stores who likely do not need a dedicated device:

- Microsoft 365 E3 at \$32 per month
- Microsoft 365 E5 at \$57 per month
- Microsoft 365 F3 at \$8 per month

» **For Education:** Free and paid licenses are available for educators, faculty, staff, and students based on the following plans:

- Microsoft 365 A1 available for free
- Microsoft 365 A3 for \$3.25 monthly for educators and \$2.50 for students
- Microsoft 365 A5 for \$8 per monthly for educators and \$6 for students

## HALT! WHO GOES IN THERE? SIGNING IN WITH THE RIGHT CREDENTIALS

As the name suggests, the home plans for Microsoft 365 are intended for home use only. The business, enterprise, school, or government plans are intended for work. The difference between these two plans becomes apparent when you sign in to Microsoft 365. If you have a home plan, you'll sign in using a Microsoft account like `jenn@outlook.com` or `siddha@live.com`. If you are using a plan assigned to you by your company, you'll sign in to Microsoft 365 with your user ID or a work or school account. The user ID is typically given to you by your IT team and may look something like `sandra@cloud611.com` where "cloud611.com" is the domain of your company.



For the latest pricing, check out the Microsoft 365 home page at: [www.microsoft.com/en-us/microsoft-365](http://www.microsoft.com/en-us/microsoft-365).

TIP

## Honing in on the Workplace Features

When the pandemic hit in 2020, I was already using the bundled features of Microsoft 365, which included tools for collaboration, security, and integrated device management. At that time, I thought to myself, “Wow, the introverts have won! With the productivity tools I have, I never have to set foot in an office setting again without giving up the appearance of professionalism even if the lower half of my wardrobe is mainly lounge wear!”

Little did I know that nine months of working from home without social contact with other human beings at work would get old, even for an introvert like me. Fortunately, the new features in the service helped bridge the gap for me and many other information workers who had to adapt to the new world of working from home quickly. As it turns out, video conferencing in Teams can provide an almost face-to-face meeting experience when done right.

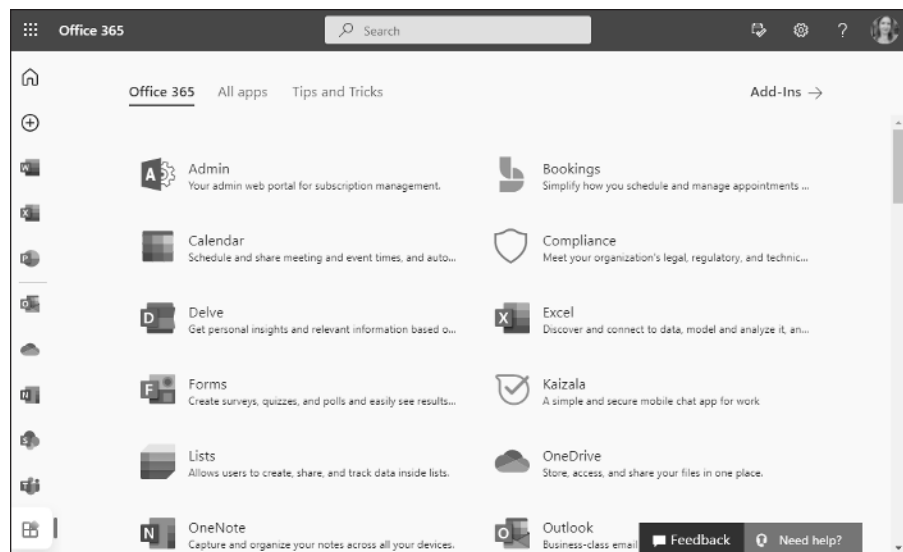
### Reining in the apps and services

Microsoft 365 comes with the following bundled services that information workers would typically use in their daily tasks:

- » **Office 365** includes tools and features that drive productivity by enabling real-time collaboration for any device anywhere. The services (or “workloads” as your IT team would call them) include:
  - **Exchange Online**, which powers business-class email
  - **SharePoint Online**, which is typically used for online storage, document and team collaboration, intranets, and more
  - **OneDrive for Business**, which functions similar to SharePoint Online but is designed more for personal use versus teamwork
  - **Microsoft Teams**, which is the hub for teamwork and the technology behind web and audio conferencing, chats, screen sharing, voice communication, and more
  - **Microsoft 365 Apps for enterprise**, which comes in both desktop, web, and mobile versions of Outlook, Word, PowerPoint, Excel, Access, and more

- » **Enterprise Mobility + Security** (commonly referred to as EMS) ensures that the device you are using whether it's a laptop, desktop, tablet, or a smart-phone, has the required security settings to keep your company data secure. The service also manages apps that you use for work so they don't get all mingled with the apps you personally use especially when you're running them on a personal device such as an iPhone. For example, your IT admin can make it so that you can't cut and paste content from your company's financial reports into Twitter or Facebook.
- » **Windows 10** is your good old operating system unless of course, you're an iOS-only-thank-you kind of computer user. If you do use a PC, Windows is what allows you to run your computer, use Windows Hello to sign in using facial recognition, or get help with your personal productivity assistant, Cortana.

Figure 1-1 shows just a snapshot of some of the apps available in Microsoft 365.



**FIGURE 1-1:** Snapshot of apps in Microsoft 365.

## No, the robots have not taken over

Microsoft 365 comes with a host of features for security and compliance, device management, task management, surveys, workflows, data visualization, no-code app development, and — wait for it — artificial intelligence! Don't worry; the robots have not taken over. They're just trying to help you be more productive and strike a sustainable work/life balance. Throughout this book, you'll find examples

of how artificial intelligence (AI), machine learning (ML), and big data work together to benefit you as a cloud service user.

Big data is simply a huge volume of data that cannot be stored or processed in the traditional way. Imagine processing the data from millions of tweets a day or analyzing the patterns and behaviors of the billions of YouTube video views per day. There are valuable insights from that data, but there is no way you can make sense of it without the use of automation and massive computing power. The combination of big data and cloud computing has led to the development of very smart computers that can learn through artificial intelligence without being programmed. This is called *machine learning* and it's so pervasive you probably don't even know you've used it.

A computer with artificial intelligence consumes big data to pick up on patterns, predict the future, and train itself to respond to a user under certain conditions. If you've used speech recognition on your mobile device, that's machine learning in action. The other day, I was using my smartphone to look for a restaurant and, to my delight, the top listings had vegetarian options. I can only guess that machine learning has picked up from my Facebook likes and posts that I'm vegetarian.

## Connecting the dots to get work done

We live in a world where the line between personal and professional lives is becoming more blurred every day. When our mobile devices synchronize both personal and work emails, it's hard not to send a quick response to a coworker after office hours. When our colleagues are also our Facebook friends, we sometimes end up talking about work in our personal spaces.

Microsoft research has shown that an information worker uses 35 different cloud services at work. And yes, that includes checking Instagram or Twitter while in a meeting. You may have even embarrassed yourself with a TikTok video (I'll probably get trolled by Gen Zs here for being redundant) on full volume when you thought you were muted in a meeting.

Between lost productivity from the distractions and potential security breaches from unsanctioned apps, how do we measure productivity these days? And, with all the apps in the service, where do you even start?



TIP

Lucky for us, there is a way to connect the dots to save our sanity. The connected experience in Microsoft 365 starts in Teams, which serves as the hub for collaboration. It combines chats, calls, meetings, documents, videos, and even a breathing exercise to help reduce stress at work at home!

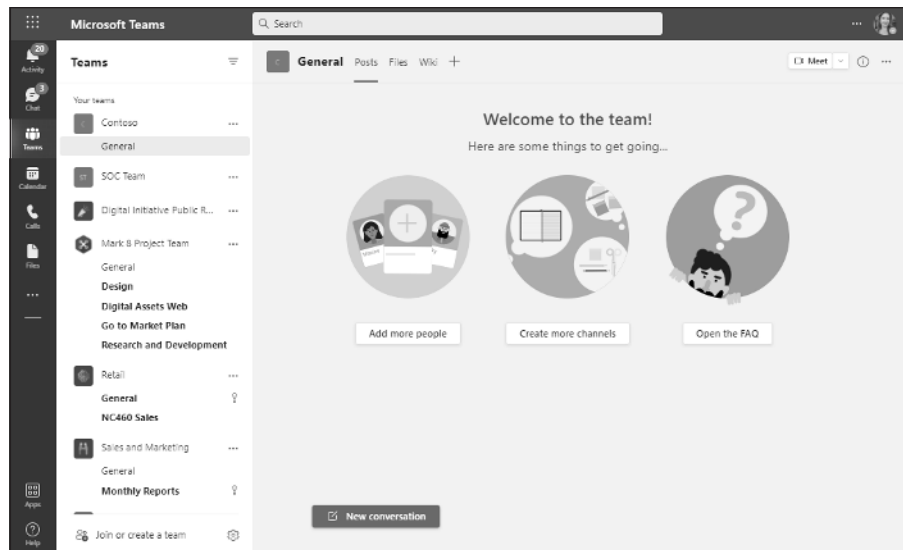
Let's put this into action to prove the point. Suppose you are working with your colleagues on a project. In any given project, the following usually happens:

- » You need to get all the members of the team together and meet on a regular basis.
- » You need to share information.
- » You need to have notes and documentation.

In Microsoft 365, here's how you start managing your project:

1. **Navigate to <https://teams.microsoft.com> and log in to Microsoft Teams with your Microsoft 365 account.**
2. **Click Join or create a team that appears in the bottom-left corner of the screen to gather your team together (see Figure 1-2).**

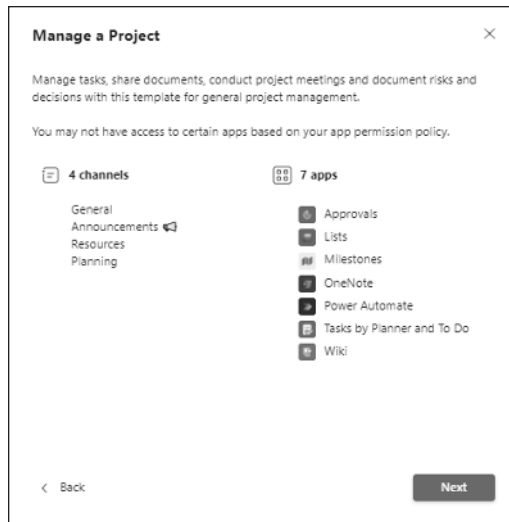
The Join or create team screen appears.



**FIGURE 1-2:**  
Creating a new  
Teams hub.

3. **From the Join or create team screen, select Create a team.**
4. **From the Create a team pop-up window, select Manage a Project.**

The appropriate channels and apps are automatically added in the template, as shown in Figure 1-3.



**FIGURE 1-3:**  
Manage a Project  
template.

5. Click Next.
6. Select Private to make your Teams hub only accessible to the members you select to be part of the team.
7. In the Some quick details about your private team window, enter Project Thunder under Team Name; enter Collaboration Hub for Project Thunder under Description; and then click the Create button.  
  
While the system is creating the Teams hub, you can safely click the Close button and do something else.
8. From the General channel of your newly created Teams hub (you may have to scroll down to find it from the left navigation), add team members by clicking the Add more people link, as shown in Figure 1-4.
9. In the Add members to Project Thunder window, type the name of your colleagues you want to add to the Teams hub and then click the Add button on the right.
10. When you have added all the team members, click the Close button.

Congratulations! You just created a new collaboration space for your project using Teams! You can now start a persistent chat by clicking the New conversation button or share files from the Files tab and take notes from the Wiki tab! Check out Chapter 4 for more information on using Teams to supercharge workplace collaboration.

**FIGURE 1-4:**  
Add more people  
to the Teams hub.

